

System Admin Module – External Form Configuration

System Admin Menu

If you are a **Superuser**, you will be able to access the **System Admin** area of Tractivity through your normal login.

1. To access System Admin; at the very top of your Tractivity page. Please click into 'System Admin'.
2. Once within System Admin; you can find the menu on the left-hand side.
3. To access any areas of System Admin, click the red link of the option you wish to edit/view or amend.

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[System Admin](#) | [Help Center](#) | [Archive](#) | [My Settings](#) | [Log-out](#)

Logged-in as: Dan Page | Last log-in: 14:11 on 27/10/2023

You are currently viewing: Training

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

STAKEHOLDER MAPPING

STRATEGY PLANS

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS

System Admin: View Client

2

Add New:

- [Add User](#)
- [Add Project](#)

Client:

- [View Client](#)
- [Edit Client](#)

Communication:

- [Send Preferences Email](#)

Stakeholders:

- [Import Stakeholders](#)
- [Merge Stakeholders](#)
- [Share Stakeholders](#)

Configuration:

- [Field Configuration](#)

3

Name

Client Name

Allow Project Tiering?

Yes

Address

Systems House Ashford Road Bakewell Derbyshire DE45 1GT

Multi-Factor Authentication ?

Optionally apply per user

Users (54)

Projects (41)

Title	Last Access	Account Status	System Admin	Edit	Remove
Adamson, Vicky	26/10/2023	Active	Yes	Edit	Remove

External Forms

External forms are editable forms that you can send either internally or externally to gather stakeholders' details – that once inputted into the form, will create a contact/organisation or even an activity.

External forms are sent via URL and can be copied into an email or how you see fit to send out to your requested audience.

1. External forms can be found by **superusers** within the system admin left-hand side menu. Under **Configuration > External Forms**.

2. This will show a list of all current External Forms that have been created. To create a new External Form – Click **Add New Form** under **Add New**.

System Admin: List External Forms



2

Add New:

- Add New Form

External Forms

- All Forms

Client:

- View Client

Stakeholders:

- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

Configuration:

- Field Configuration
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms
- Stakeholder Mapping Attributes
- SMS Configuration
- IP Configuration
- Manage API Credentials
- SSO - Identity Providers

1

Title	Project	Preview	URL	Added By	Last Edited By	
Anna Test Form	2. Hull	Preview	View - Copy	Tunncliffe, Anna 05/08/2021	Adamson, Vicky 08/10/2021	Archive
Contact Newsletter Signup	2. Hull	Preview	View - Copy	Keep, Tom 18/08/2020	Adamson, Vicky 05/09/2023	Archive
Contact Newsletter Subscribe in Form	Training Project (Do Not Use)	Preview	View - Copy	Tunncliffe, Anna 02/02/2022	Adamson, Vicky 11/11/2022	Archive
Contact Us Form	Customer Success Team Training	Preview	View - Copy	Adamson, Vicky 14/02/2023	Adamson, Vicky 14/02/2023	Archive
Ebony - External Form Test	Ebony	Preview	View - Copy	Dabreo, Ebony 17/01/2023	Dabreo, Ebony 17/01/2023	Archive
Ebony - Newsletter Sign up form	Ebony	Preview	View - Copy	Dabreo, Ebony 27/01/2023	Dabreo, Ebony 27/01/2023	Archive
EEH Test newsletter sign up form	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 18/05/2022	Sandhu, Jaz 18/05/2022	Archive
Feedback Form	Energy	Preview	View - Copy	Swift, Caroline 07/07/2023	Swift, Caroline 07/07/2023	Archive
GWR TEST	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 07/04/2022	Sandhu, Jaz 07/04/2022	Archive
Gwynt Glas - test	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 05/07/2022	Sandhu, Jaz 05/07/2022	Archive
Kate Test Sign up form	Kate's Project	Preview	View - Copy	Martin, Kate 27/10/2023	Martin, Kate 27/10/2023	Archive
Keeping In Touch	Training Project (Do Not Use)	Preview	View - Copy	Rodgers, Thom 05/09/2023	Rodgers, Thom 05/09/2023	Archive

Once you have clicked into Add New Form – You will be shown a Form Details page, where you have some options to add some customisation to the form.

- ## Add External Form

FORM DETAILS

Project *	Dan P Project ▼
Form Title*	Event Attendees
Needs login*	No ▼
Duplication check projects*	42 selected ↕
Introduction text:	<div> B <i>I</i> <u>U</u> <div>☰ ☷ ☹ ☺</div> <div>⋮ ⌵ ⋮ ⌶</div> <div>↻ 🔍 <></div> </div> <div> Arial ▼ Paragraph ▼ 12pt ▼ </div> <div> A ▼ ▼ </div> <p>Introduce the company/project and potentially the reason for requiring this information.</p>
Thank you text:	<div> B <i>I</i> <u>U</u> <div>☰ ☷ ☹ ☺</div> <div>⋮ ⌵ ⋮ ⌶</div> <div>↻ 🔍 <></div> </div> <div> Arial ▼ Paragraph ▼ 12pt ▼ </div> <div> A ▼ ▼ </div> <p>Thanks for inputting this information - this will be stored.</p>

ADD

Customise Fields on External Form

When creating an external form, you must be gathering information for either a contact or an organisation.

Once selected, you can then choose whether you would like to create an activity also.

1. Select whether you would like to create an **Organisation** or **Contact**. Using the tick box.
2. If applicable, choose whether you would like to create activity/enquiry.
3. **Expand** the drop-down fields using the **+** icon to view the external form questions.

Add External Form



Please note that you must create a Contact and/or an Organisation.

FORM CONTENT

☐ Hide non-visible ☐ Hide valid ☐ Hide non-required

Would you like to create an Organisation? ☐

1

Would you like to create a Contact? ☒

Contact Fields

3



2

Would you like to create a Contact Activity? ☐

Would you like to create an Address? ☐

Would you like to create an Enquiry? ☐

BACK

ADD

Customise Fields on External Form - Continued

Once you have expanded the field; you'll be shown all the **Fields** that you can gather in your form. You can switch these options on/off as you wish.

1. **Visible** – Tick this option if you would like the field to be shown on your external form.

2. **Required** – If you would like a question to be mandatory, tick this box and the question will have to be answered before being submitted.

3. **Friendly Name** – We understand that not all language within Tractivity may be understood by stakeholders or used differently. You can change the 'Friendly Name' as you wish. For example, in the screenshot attached – **Distribution List** has been amended to **Newsletter**.

4. Once you have configured the form as you wish; click **add** to ensure it's **saved**. (At the bottom of this page)

FORM CONTENT

☐ Hide non-visible☐ Hide valid☐ Hide non-required

Would you like to create an Organisation?☐

Would you like to create a Contact?☒

Contact Fields

Section Introduction:

Contact

Field Name	Friendly Name	Visible	Default Value	Required
Title	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Name	First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix	Suffix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Postcode	Postcode	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	Mobile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	Job Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Permitted	Contact Permitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Distribution Lists	Newsletter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LinkedIn	LinkedIn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
X (Twitter)	X (Twitter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Main Contact

Main Contact

☐

☐

☐

Deputy Name

Deputy Name

☐

☐

☐

Would you like to create a Contact Activity?☐

Would you like to create an Address?☐

Would you like to create an Enquiry?☐

4

BACK

ADD

View and Send External Form

Once you have added the External Form you will be taken back to the External Forms list within System Admin.

Find the External Form you just created from the list (under title) and you will now be able to view/edit or access the URL.

1. **Preview** – Clicking this will take you to view the external form you have created. You cannot share the URL from this preview page as any submissions will **not** be saved. (see screenshot attached for example)
2. **View** – Clicking this will provide the live URL link – which can you can share across to whom you wish.
3. **Copy** – Will automatically **copy the URL** of the external form without showing how this would look – for you add send out via email or however you desire.
4. **Title** – Clicking the title will take you back to edit the external form. You can amend any of the configuration, name or text you have added.
5. **Archive** – You can soft delete the external form at any time using this.

Client Confidential

4

Event Attendees

Dan P Project

1

Preview

2

3

View - Copy

Page, Dan
01/11/2023

Page, Dan
01/11/2023

5

Archive

1

Contact

Last Name (required)

Job Title (required)

Contact Permitted

☒ Email
☒ Post
☒ SMS
☒ Telephone

Distribution Lists

☐ Councillors distribution list
☐ Landowner distribution list

Project Categories (required)

☐ Business Representative
☐ Councillor
☐ Fisherman
☐ General Public
☐ Local Resident
☐ Member of Parliament



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